PENNSYLVANIA TURNPIKE COMMISSION

Records Retention

USER MANUAL
For
Records Retention Schedule

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1. Overview

1.1. About the Records Retention Application

The Records Retention Application is actually two inter-related applications: Records Retention Schedule and Inactive Records Storage. Inactive Records Storage is made up of two smaller components: Box maintenance and Shipment Maintenance.

Records Retention Schedule manages information about the many types of documents that the PTC creates, receives and uses during the normal course of business.

Inactive Records Storage manages information about documents that have passed the time requirements for onsite storage and are being prepared for shipment to the PHMC for storage.

2. Starting the Records Retention Application

2.1. Accessing the Records Retention Application

Records Retention has been published under the Citrix Environment. The following steps will step you through the process of starting Citrix and the Records Retention Application.

- ❑ Open the Citrix Program Neighborhood using the shortcut that should be located on your desktop.

- ❑ Locate the icon for Records Retention in the Citrix Program Neighborhood Window. If you do not see the icon when you first start Citrix, click on the Refresh button in the toolbar. If the icon still does not appear, you should contact the Help Desk for assistance.

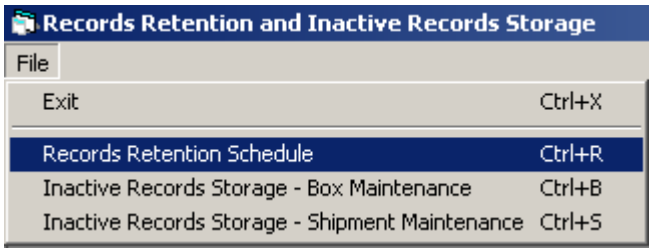
- ❑ Once you have located the icon for Records Retention, double click it to open the application.
- ❑ Once Records Retention has started, you should see the Records Retention Startup Page as shown below.

Records Retention and Inactive Records Storage
File
Welcome to the Records Retention Application
Welcome to the Records Retention Application.
Select the desired function from the
menu bar located above.
Close this form

3. Using the Records Retention Schedule

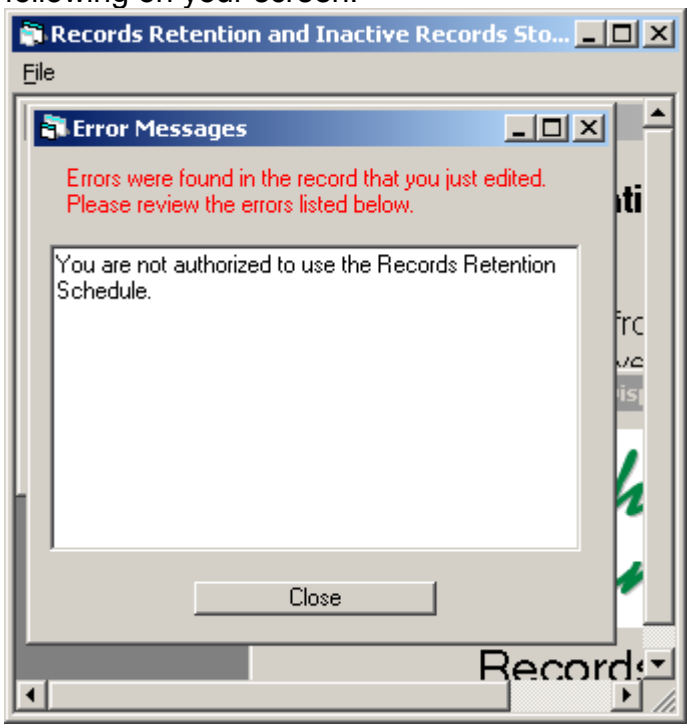
3.1. Starting Records Retention Schedule

- From the menu bar of the Records Retention Application startup page, select Records Retention Schedule.


Records Retention and Inactive Records Storage
File
Exit Ctrl+X
Records Retention Schedule Ctrl+R
Inactive Records Storage - Box Maintenance Ctrl+B
Inactive Records Storage - Shipment Maintenance Ctrl+S

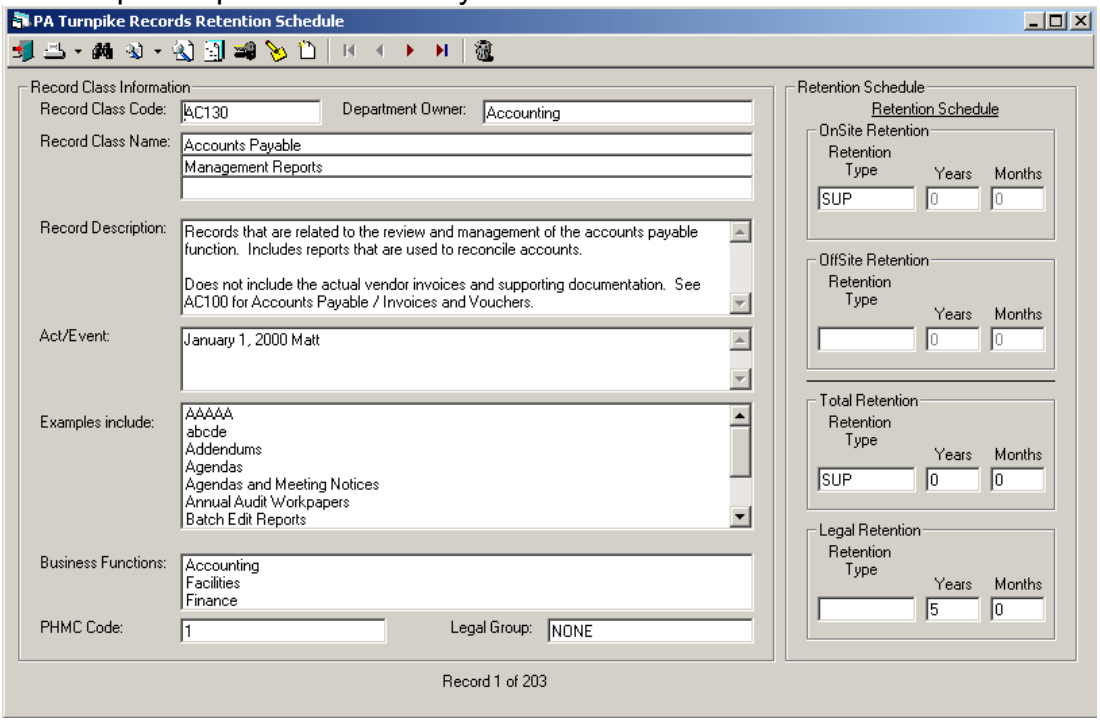
You can also start the Records Retention Schedule by pressing and holding down the CTRL key on your keyboard and then pressing the letter R.

All users of the Records Retention Schedule must have permission to use this application. If you are not an authorized user of the application, you will see the following on your screen:


Records Retention and Inactive Records Sto...
File
Error Messages
Errors were found in the record that you just edited.
Please review the errors listed below.
You are not authorized to use the Records Retention Schedule.
Close

If you see this message displayed and you feel that you should be an authorized user of the Records Retention Schedule, submit a System Security Request form through your manager or supervisor to request access.

If you are an authorized user, you will see the following form on your screen. Note that the exact contents of what you see on the screen can vary depending on the specific permissions that you have for the Records Retention Schedule.

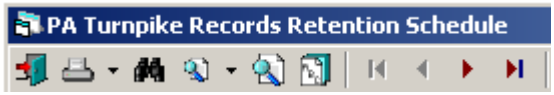


At the time when this User Manual was written, there are three permission levels in the Records Retention Schedule:

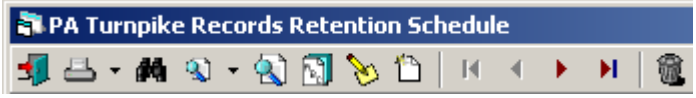
1. General User
2. Data Administrator
3. User Administrator

Note that the permissions for both Data Administrator and User Administrator can be assigned to a user to effectively create a fourth permission level.

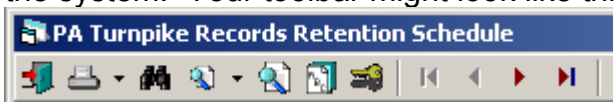
If you are a General User, you will be given access to functions designed to provide you with read-only access to PTC General information. This means that you will not be able to change information within the Records Retention Schedule. Your toolbar should look like this:



If you have been assigned Data Administration permissions, your toolbar will contain additional buttons that provide access to functions to add, change or delete information in the Records Retention Schedule. Your toolbar might look something like this:



If you have been assigned User Administration permissions, your toolbar will have the button for accessing User Security Management functions. This permission grants you the ability to add or remove users to the Records Retention Schedule as well as to change what permission other users have in the system. Your toolbar might look like this:



There will be some users who are granted both Data and User Administration permissions. If this is the case, your toolbar will include all of the buttons for all functions. Your toolbar will look like this:

4. Viewing Information in the Records Retention Schedule

4.1. Moving through the Record Classes

There are two basic methods for moving from record to record while in the Records Retention Schedule. The first uses navigation buttons that are located on the toolbar.

From left to right, the purpose of each navigation button is:

- Move to the First record
- Move to the Previous record
- Move to the Next record
- Move to the Last record

As you move through the records, the state of the navigation buttons can change. For example, if you are viewing the first record, the buttons for Move First and Move Previous will be disabled.

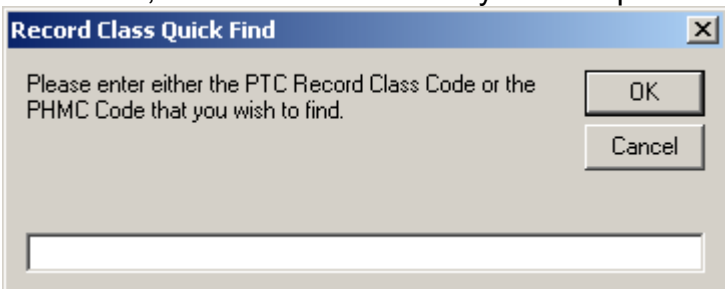
The second method for moving from record to record is through the use of the keyboard. The following keys have been assigned equivalent functions to the Navigation buttons.

- Home – Move to the First record
- Page Up – Move to the Previous record
- Page Down – Move to the Next record
- End – Move to the Last record

4.2. Moving to a Specific Record Class Code

A “Find a Record Class” tool has been provided to permit you to move directly to a specific Record Class. The toolbar button for this tool is shown as a Binocular Icon.

When you click on this button, you will be asked to provide either a PTC Record Class Code or a PHMC Code. The tool determines which type it is by looking at what you enter. PTC Record Class Codes include both letters and numbers. PHMC Codes are all numbers. If you enter a value that has only numbers, it is assumed that you are looking for a Record Class using a PHMC Code. Otherwise, the tool assumes that you have provided a PTC Record Class code.



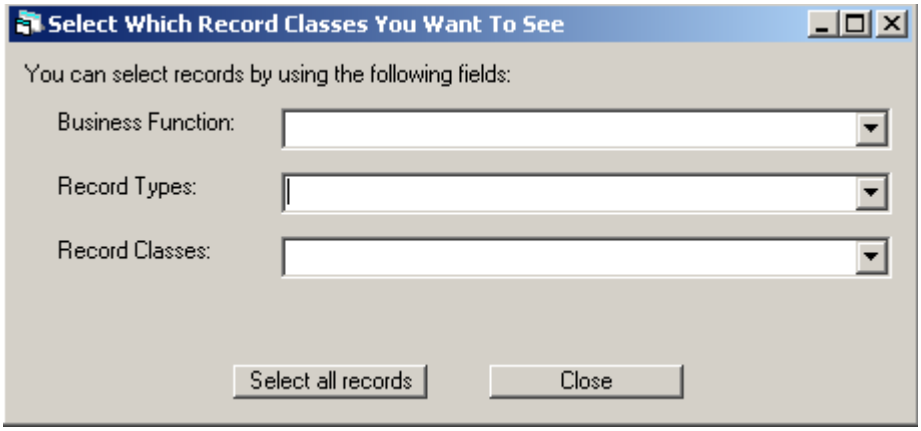
4.3. Limiting Which Records are displayed using the Select Tool

The “Find a Record Class” tool that was described in the previous section locates a specific Record Class and displays it. Many times, this will be the quickest and easiest method for finding information about a specific Record Class.

At other times, you might not know what the PTC Record Class Code or the PHMC Code for a Record Class is. In cases like this, you would have to browse through the Record Classes one at a time until you find the one that you are looking for. In order to make it easier to find Record Classes, two tools are provided with the Records Retention Schedule. The first of these tools is the “Select Specific Records” tool. The other tool is the “Custom Selection tool”. This section describes the “Select Specific Records” tool. If this tool does not help you to find the Record Class that you need, look at the next section of this manual for a description of the “Custom Selection” tool.

The toolbar button for the “Select Specific Records” tool is located just to the right of the “Find a Record Class” tool button.

When you click on the toolbar button, you will see a form that permits you to select which record classes will be shown by using lists of values for three different fields.



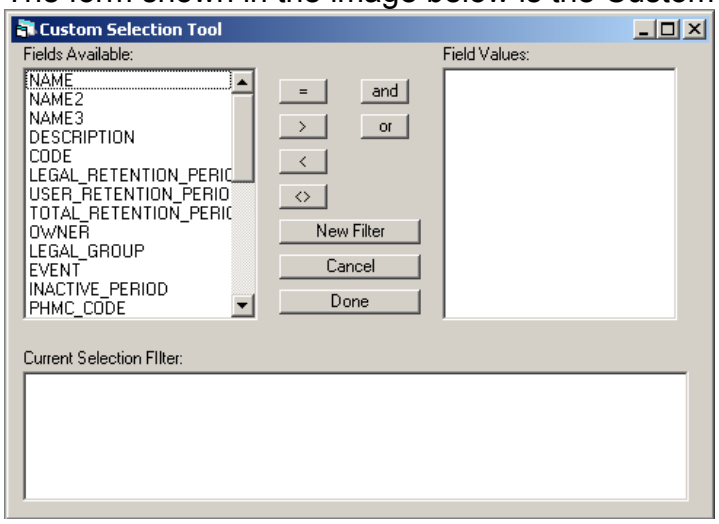
For example, if you click on the small arrow located on the right edge of the box that is labeled “Business Function:”, you will see a list of all Business Functions that are currently used in the Records Retention Schedule. When you pick one of these Business Functions, you will be returned to the main display form where only Record Classes that are associated with the Business Function that you picked will be shown.

4.4. Limiting Which Records are displayed using the Custom Selection tool

The “Select Specific Records” tool permits selection of records using only one of three preset criteria. There will be times when this is not sufficient. The “Custom Selection” tool has been provided to attempt to address most requests for limiting which records are displayed.

As shown in the image below, the “Custom Selection” tool can be found by clicking the dropdown arrow immediately to the right of the “Select Specific Records” button on the toolbar.

The form shown in the image below is the Custom Selection tool.



The box on the left, which is labeled “Fields Available”, shows a list all of the fields in the Record Class table that you can search on. Once you pick a field from the Fields Available list, a list of all unique values that are currently available in all Record Classes will be shown in the Field Values list.

The process for building a custom selection is basically:

1. Select a field.
2. Select a comparison operator (=, >, < or <>)
3. Select a value to select on.
4. Add an additional requirement using a logical operator (AND/OR) or click on done
5. Repeat steps 1 to 4 until all requirements have been entered.

While this tool provides a very flexible mechanism for selecting which records will be displayed, it does have some limitations. These limitations are generally found when attempting to add highly complex selection statements that combine the OR and the AND logical operators.

Example Use:
For this example, we will build a custom filter that will display all Record Classes that have a department owner of Engineering Construction or Engineering Design.

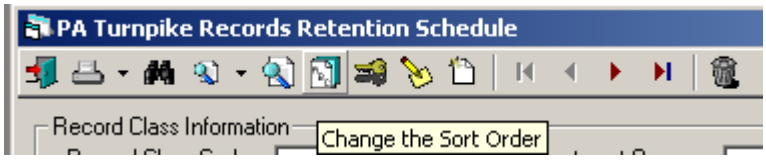
- ❑ Click on the menu item for the Custom Selection tool.
- ❑ Look in the window at the bottom of the form. If you see any text there, this means that there is already a filter applied that limits which record classes will be displayed. To remove the current filter, click on the New Filter button.
- ❑ Locate the word OWNER in the Fields Available list and click on it. The word OWNER should be displayed in the "Current Selection Filter" box and a list of possible Owners should be displayed in the Field Values list.
- ❑ Click on the equal (=) sign button. An equal (=) sign should be added to the "Current Selection Filter" box.
- ❑ Find the line in the list of Field Values that says "Engineering Construction" and click on it. The string "Engineering Construction" should be added to the "Current Selection Filter" box in single quotes instead of double quotes.
- ❑ At this point, you should see the string OWNER = 'Engineering Construction' in the "Current Selection Filter" box.
- ❑ Now we need to add the second half of the filter. Remember that we want to see all records that are owned by Engineering Construction OR Engineering Design.
- ❑ In the center of the form, you will find a button that is labeled "or". Click on this button and you will see the word "or" added to the current filter.
- ❑ Now go through the same steps as above to add Engineering Design to the filter. Find and click on the word "OWNER" in the Fields Available list. Then click on the equal sign. Finally, click on the line that says "Engineering Design" in the Field Values list.
- ❑ The "Current Selection Filter" window should now have the following: OWNER = 'Engineering Construction' or OWNER = 'Engineering Design'
- ❑ Click on the "Done" button and you will be returned to the main display. If you scroll through the Record Classes now, you will see that the only records that you can see have an owner of Engineering Construction or Engineering Design.

4.5. Removing Limits on Which Records are Displayed

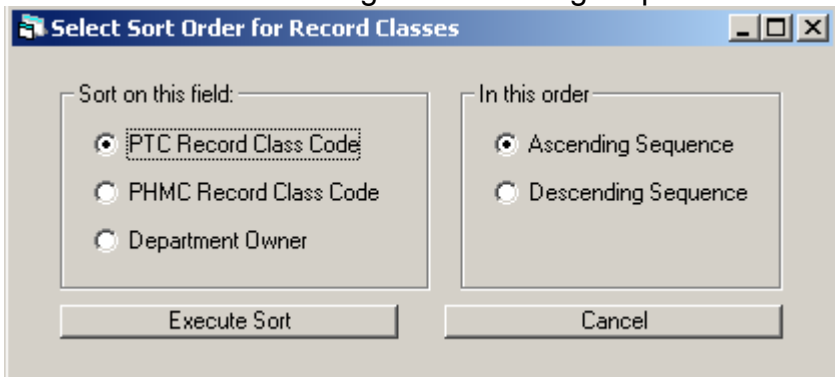
The last two sections showed you how you can limit which Record Classes are shown to you. A tool has been provided that will quickly removing any limits that you have placed with those tools. As shown in the image below, the "Select All Records" tool is located to the right of the "Select Specific Records" button on the toolbar. Clicking on this button will remove the current limit and cause all records to be shown again.

4.6. Changing the Order in Which Records are Displayed

When you start the Records Retention Schedule, the records are shown in PTC Record Class Code order. There may be times when you wish to view the records in a different order. To permit this, the “Change the Sort Order “ tool has been provided. The button for this tool is located just to the right of the “Select All Records” tool button.



At this time, the sorting can be done on any of the three fields shown below and can be in either ascending or descending sequence.

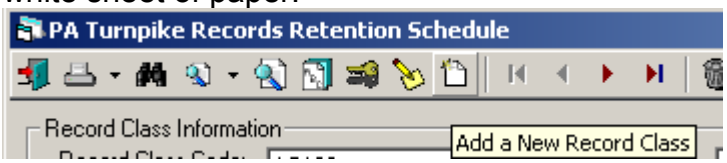


5. Adding New or Editing Existing Record Classes

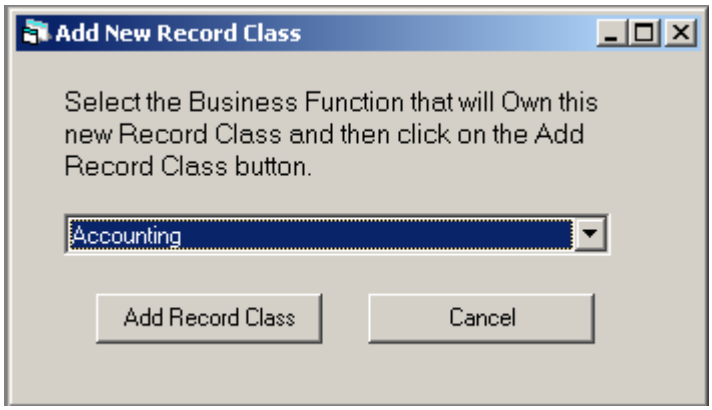
If your user account in the Records Retention Schedule does not have Data Administrator permissions, you will not be able to perform any of the tasks that are described in this section.

5.1. Adding a New Record Class

The toolbar button for the “Add a New Record Class” tool is shown as a blank, white sheet of paper.



Once you click on the button to add a new Record Class, you will see a form where the Business Function that is to own the new Record Class can be selected.

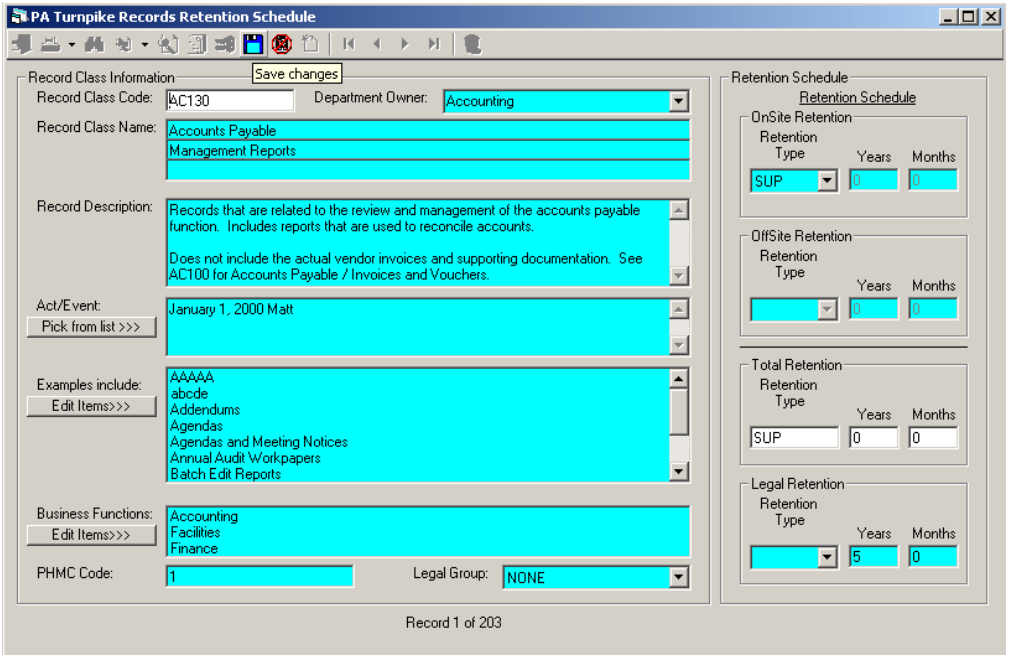

Add New Record Class
Select the Business Function that will Own this new Record Class and then click on the Add Record Class button.
Accounting
Add Record Class
Cancel

The reason for this is that the “owning” Business Function determines the first part (prefix) of the new Record Class Code.

After you select the desired Business Function and click on the Add Record Class button, the program will do the following:

1. The Business Function that you selected will be used to determine the prefix for the new Record Class Code.
2. The highest numbered Record Class that is currently in the system with the same prefix is found.
3. The number part of the highest existing code is broken out and ten (10) is added to it.
4. The prefix and the new number will be added together to make up the Record Class Code for the new Record Class.

When this has been done, the display form will be displayed in Edit Mode with the new Record Class Code and the Business Functions list filled in. In addition, the year and month values for all Retention Periods will be defaulted to Zero. To complete the process of adding the new Record Class, you must click on the Save Changes toolbar button.



While in Edit Mode, you can change any field that has a Blue background color. For most of the fields, you can key the new or changed values directly into the field. For the Act/Event, Examples Include or Business Functions list, there is a button located next to the field that you should use to edit the field value(s).

5.2. Editing an Existing Record Class

There are three buttons on the toolbar that are involved in the process of editing records. Until you enter Edit mode by clicking on the “Edit Record” button, you will not be able to see the other two: “Save Changes” and “Cancel Changes”.

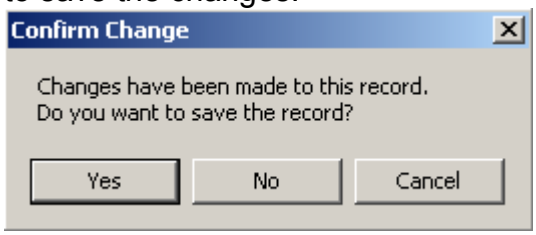
The Edit Record button is shown as a yellow pencil over a yellow piece of paper.

Once you enter Edit mode, two things will happen to the toolbar. First, the Edit Record button will disappear and be replaced by two other buttons. The second change is that all other buttons on the toolbar are disabled while you are in Edit mode.

5.2.1. Saving Changes to a Record Class

When you make changes to the fields of a Record Class, you must click on the Save Changes button on the toolbar.

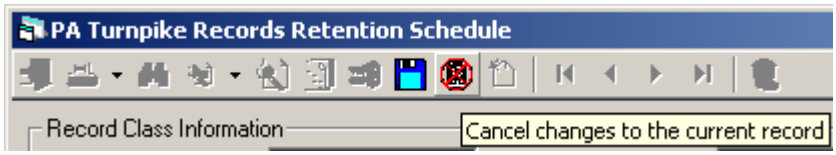
When you do this, the program will check to see if you have made any changes. If changes are detected, you will be asked to confirm that you want to save the changes.



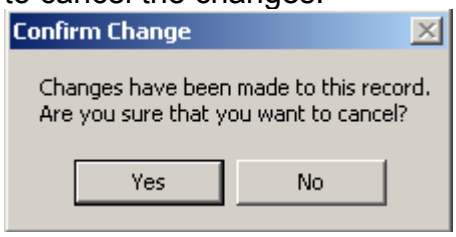
This could be your last chance to cancel any changes that you have made to the Record Class. If you click on the Yes button, the program will try to save the changes that you have made. If you click on the No button, the changes that you have made will be discarded and the Record Class will remain the way it was. If you click on the Cancel button, you will be returned to the Record Class display form where you can make additional changes.

5.2.2. Canceling Changes to a Record Class

If you make changes to the fields of a Record Class and then decide that you do not want to save the changes, you can click on the “Cancel Changes” button on the toolbar.



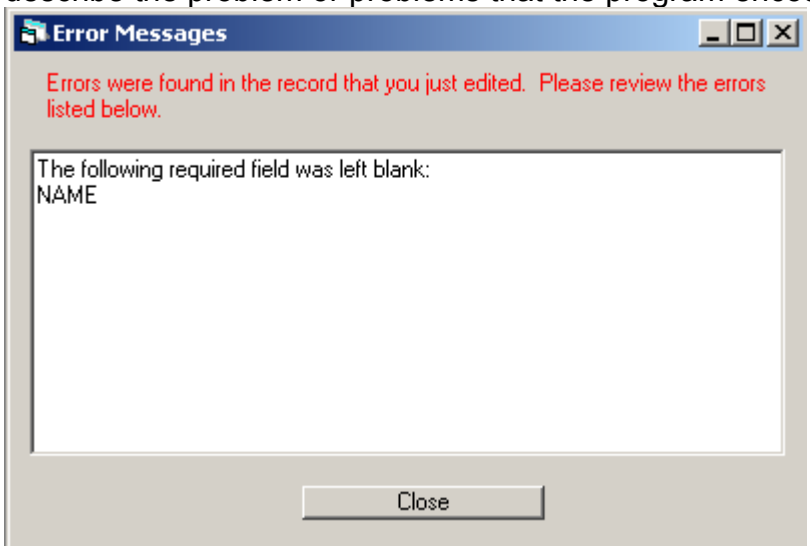
When you do this, the program will check to see if you have made any changes. If changes are detected, you will be asked to confirm that you want to cancel the changes.



If you click on the Yes button, the program will discard the changes that you have made. If you click on the No button, you will be returned to the Record Class display form where you can make additional changes or click on the Save Changes button.

5.2.3. Error Messages in the Records Retention Schedule

The program has been designed to detect many problems that might occur while you are using the Records Retention Schedule. In most cases, a special Errors form will be displayed that will list one or more messages that will describe the problem or problems that the program encountered.


Error Messages
Errors were found in the record that you just edited. Please review the errors listed below.
The following required field was left blank:
NAME
Close

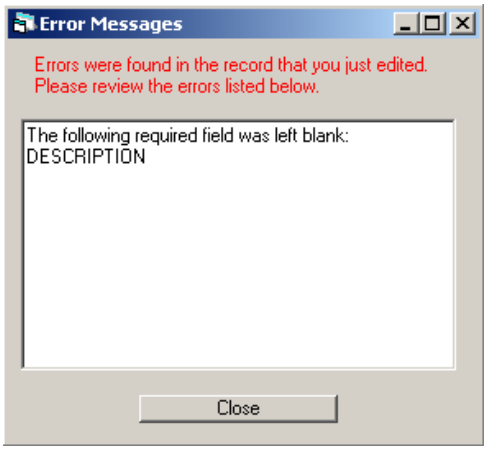
The Errors form can be moved to the side so that you can see both the messages that are displayed in the form and the display form for the Record Class that you are editing. Once you have read the messages and have made any needed changes to the Record Class, you should close the Errors form by clicking on the button that is labeled Closed.

5.2.4. Required Fields in Records Retention Schedule

Certain fields in RRS are required. These fields are:

- ☐ Record Class Code
- ☐ Record Class Name (first line only)
- ☐ Record Description

If you leave one of these fields blank and try to save the Record Class, you will see a form stating that a required field was left blank. The name of the field or fields will be listed below the error message.

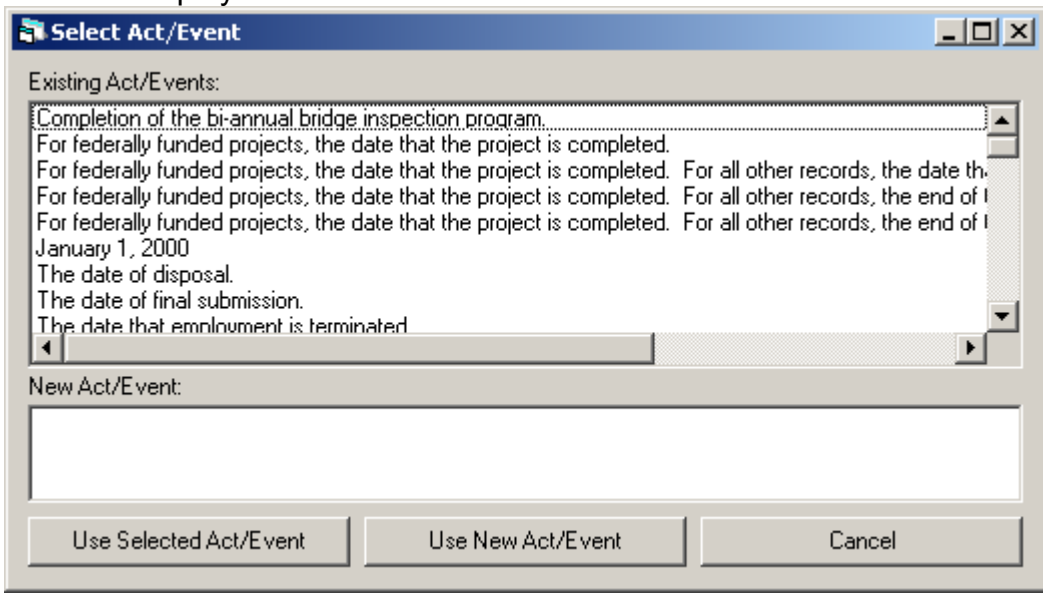

Error Messages
Errors were found in the record that you just edited. Please review the errors listed below.
The following required field was left blank:
DESCRIPTION
Close

5.2.5. Setting the Act/Event for a Record Class

The Act/Event field on the Record Class form is directly editable. You may enter text for an Act/Event directly into the field. In order to save keystrokes and to provide more consistent text in this field, a tool has been provided that permits you to pick an Act/Event that has already been used with another Record Class. Unless you know that the Act/Event for the Record Class that is being edited is a new one, it is recommended that you use the tool to select the Act/Event.

To access this tool, go into Edit Mode and click on button that is labeled “Pick from list >>>”. This button is located to the left of the Act/Event field.

Once you have clicked on this button, the “Select Act/Event” form will be displayed. You can now select an Act/Event from the list provided. After you have selected an existing Act/Event, click on the “Use Selected Act/Event” button. The Act/Event that you picked will be moved to the Act/Event field on the main display form.

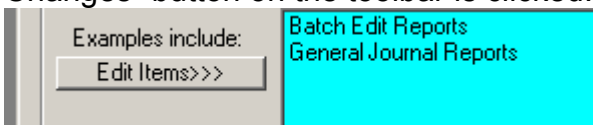

Select Act/Event
Existing Act/Events:
Completion of the bi-annual bridge inspection program.
For federally funded projects, the date that the project is completed.
For federally funded projects, the date that the project is completed. For all other records, the date th
For federally funded projects, the date that the project is completed. For all other records, the end of
For federally funded projects, the date that the project is completed. For all other records, the end of
January 1, 2000
The date of disposal.
The date of final submission.
The date that employment is terminated
New Act/Event:
Use Selected Act/Event
Use New Act/Event
Cancel

If you do not find an existing Act/Event in the list, a field has been provided on this form for you to add a new Act/Event. In this case, you should click on the “Use New Act/Event” button to move the new text to the Act/Event field on the main display form.

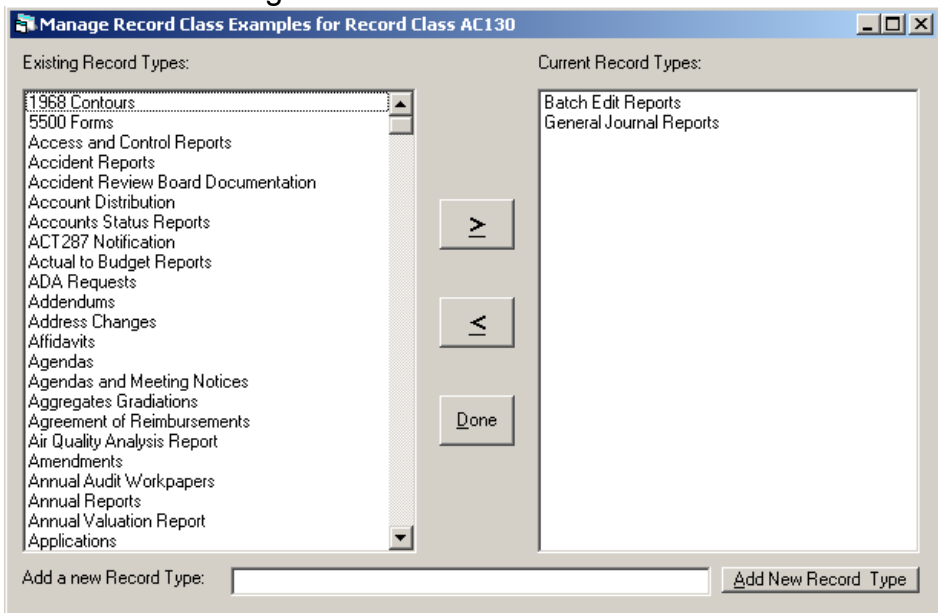
The “Cancel” button will return you to the main display form without making any changes to the Act/Event field.

5.2.6. Changing the List of Record Examples for a Record Class

The “Examples Include” field shows specific types of records that are associated with the Record Class being edited. You can make changes to this list by using a tool that is started by clicking on the “Edit Items>>>” button. This button located next to the “Examples Include” field. Note that changes to the contents of this field are not saved into the database until the “Save Changes” button on the toolbar is clicked.

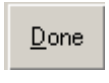


The “Manage Record Class Examples” form contains two lists of record types. The “Existing Record Types” list on the left side of the form shows all Record Types that are currently in use in Records Retention Schedule but not associated with the current Record Class. The “Current Record Types” list on the right shows all of the Record Types that are currently associated with the Record Class being edited.



To add a new Record Class Example to the Record Class that you are editing, select an example from the “Existing Record Types” list of the left. Then click on the button in the middle of the form with an arrow pointing to the right. This will move the example that you selected to the “Current Record Types” list.

To remove a Record Class Example from the current Record Class, select the example that you wish to remove from the “Current Record Types” list. Then click on the button in the middle of the form with an arrow pointing to the left. This will remove the example that you selected from the “Current Record Types” list.

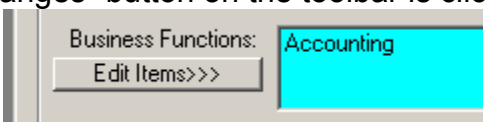


When you are done making changes to the Record Class Examples list, click on the Done button and you will be returned to the main display form.

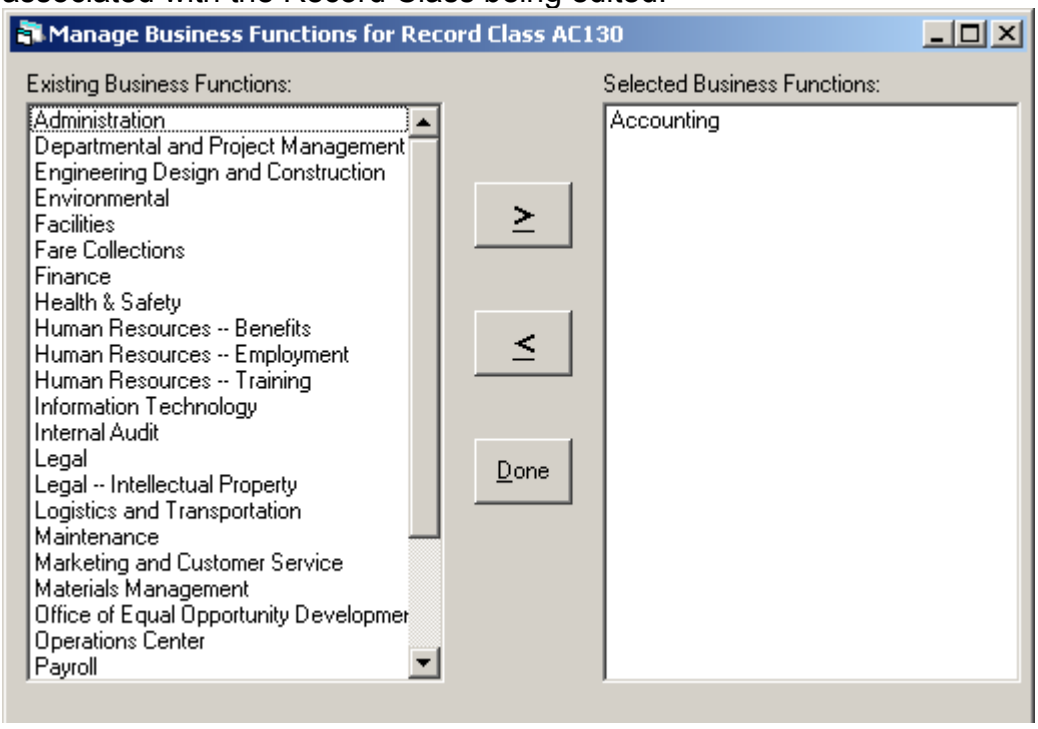
If you do not find a Record Class Example in the “Existing Record Types” list that meets your needs, a field has been provided for you to add a new one to the system. Enter the new Record Class Example in the field shown below and click on the button to the right to Add the new entry.

5.2.7. Changing the List of Business Functions for a Record Class

The Business Functions Listbox shows the PTC Business Functions that are associated with the Record Class being edited. Modifications to this list can be done using a tool that is started by clicking on the “Edit Items>>>” button located next to the Business Functions field. Note that changes to the contents of this listbox are not saved into the database until the “Save Changes” button on the toolbar is clicked.

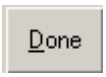


The “Manage Business Functions” form contains two lists of Business Functions. The list of “Existing Business Functions” that is shown on the left of the form shows all of the Business Functions that are supported within the Records Retention Schedule. The “Selected Business Functions” list on the right side of the form shows all of the Business Functions that are currently associated with the Record Class being edited.



To add a new Business Function to the Record Class that you are editing, select the Business Function from the "Existing Business Functions" list on the left. Then click on the button in the middle of the form with an arrow pointing to the right. This will move the Business Function that you selected to the "Selected Business Functions" list.

To remove a Business Function from the current Record Class, select the Business Function that you wish to remove from the "Selected Business Functions" list. Then click on the button in the middle of the form with an arrow pointing to the left. This will remove the Business Function that you selected from the "Selected Business Functions" list.



When you are done making changes to the "Selected Business Functions" list, click on the Done button and you will be returned to the main display form.

5.2.8. Working with Retention Periods for a Record Class

In the Records Retention Schedule, Retention Periods have two parts:

- Retention Type
- Retention Duration in Years and Months

The Retention Type can be have the following values:

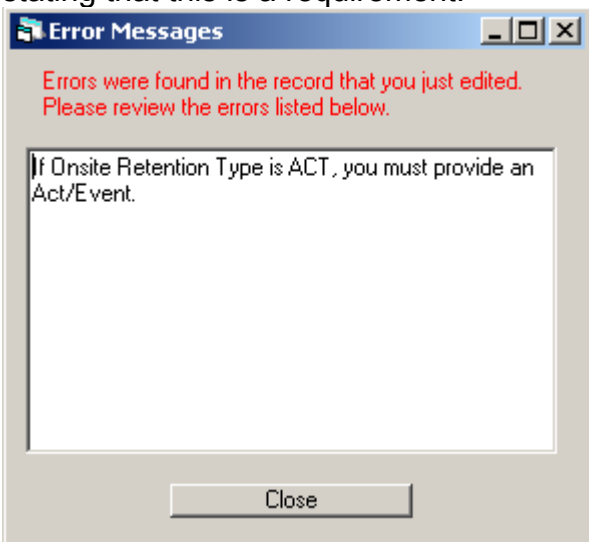
- <blank>
- ACT
- SUP
- MAX
- IND

For details about the definition of these Retention Types, see the Records Retention Schedule manual.

When you select a Retention Type for the OnSite Retention, the program will determine if other Retentions or values are needed or permitted. The table below shows some of these situations:

Retention Type	Results
<blank>	Onsite Years & Months are enabled Offsite Retention Type, Years & Months are enabled
ACT	Onsite Years & Months are enabled An Act/Event must be entered. Offsite Retention Type, Years & Months are enabled
MAX	Onsite Years & Months are enabled Offsite Retention Type, Years & Months are disabled
SUP	Onsite Years & Months are disabled Offsite Retention Type, Years & Months are disabled
IND	Onsite Years & Months are disabled Offsite Retention Type, Years & Months are disabled

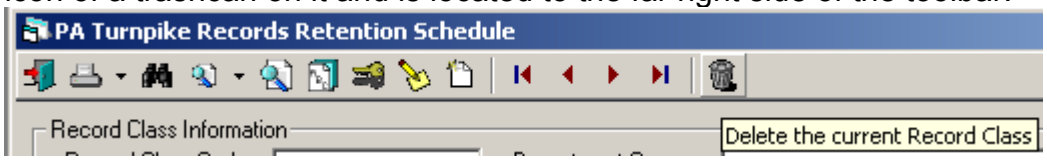
As noted in the table above, if you select a Retention Type of ACT for the OnSite Retention, you must provide an Act/Event. If you do not do this, when you try to save the Record Class, you will see the Errors form with a message stating that this is a requirement.


Error Messages
Errors were found in the record that you just edited.
Please review the errors listed below.
If Onsite Retention Type is ACT, you must provide an Act/Event.
Close

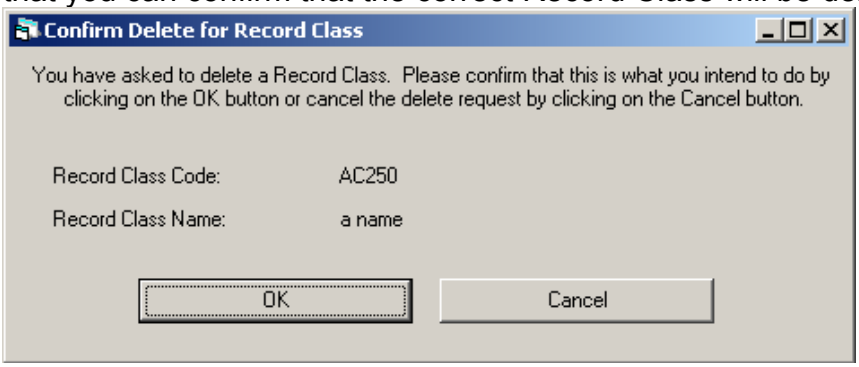
If you change the Onsite and Offsite Retentions, the program will automatically calculate what the new Total Retention should be. This occurs only when you save the record.

5.3. Deleting a Record Class from Records Retention Schedule

If you need to remove a Record Class from the Records Retention Schedule, a toolbar button has been provided to start the delete process. This button has an icon of a trashcan on it and is located to the far right side of the toolbar.



When you click on the delete button, a form will be displayed asking you to confirm that you wish to delete the current Record Class. The form should display the Record Class Code and the first line of the Record Class Name so that you can confirm that the correct Record Class will be deleted.


Confirm Delete for Record Class
You have asked to delete a Record Class. Please confirm that this is what you intend to do by clicking on the OK button or cancel the delete request by clicking on the Cancel button.
Record Class Code: AC250
Record Class Name: a name
OK
Cancel

If you do not wish to delete the Record Class that is shown on the Delete form, click on the Cancel Button to return to the main display form.

If you do wish to delete the Record Class that is shown on the Delete form, click on the OK button and the Record Class and all associated records will be removed from the system.

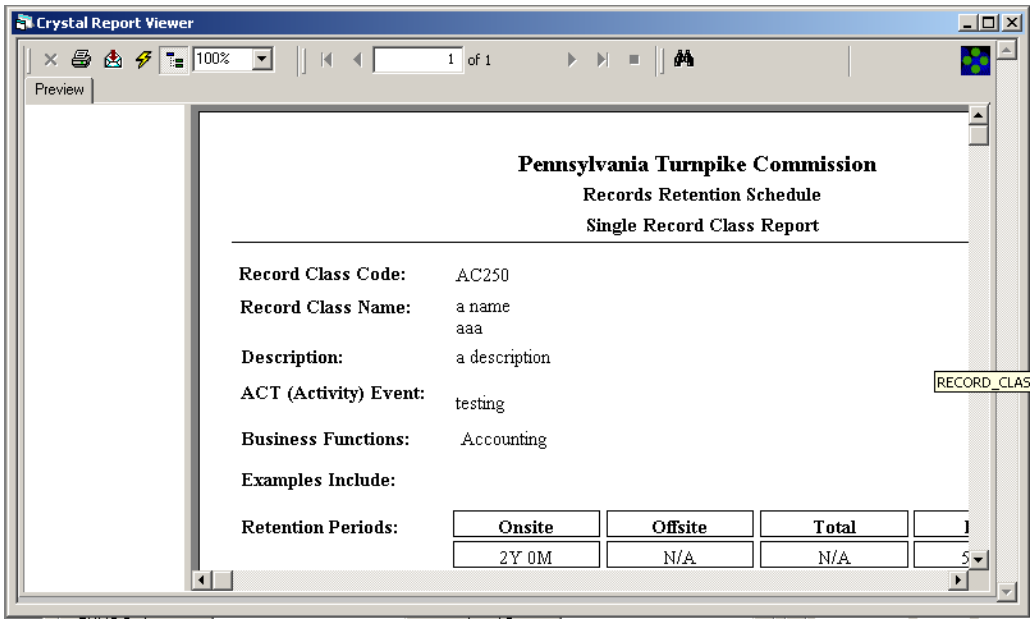
6. Working with Records Retention Schedule Reports

A number of reports have been created for the Records Retention Schedule. The actual number of reports that are available to you will depend on the level of permissions that you have been given in the Records Retention Schedule. All reports in the Records Retention Application were created using Crystal Reports 8.5 and are stored in the Crystal Enterprise Report Server. When you request a report in the Records Retention Schedule, a special form will be displayed that will retrieve and display the report to you.

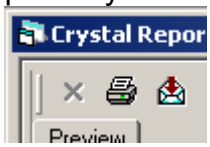
6.1. Viewing/Printing the Single Record Class Report

The Single Record Class report prints details about the current Record Class that is being displayed on the form. To view the Single Record Class Report, click on the Printer icon that is located on the toolbar.

A window will be displayed that shows the Crystal Report for a Single Record Class.



In the upper left corner of this form are two buttons that are very useful. There is a Printer icon that will send the report that you are viewing to a printer. When you click on this button, a form will be displayed where you can select what printer you wish to send the report to.



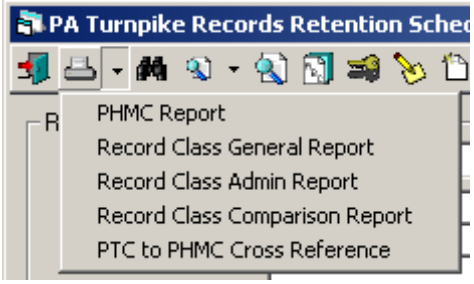
The button to the right of the printer button shows a small envelope with a red arrow pointing into it. This button is the Export Report button and it will permit you to save this report to a file that you can send to someone else or store for future use.

When you click on this button, you will see a form that looks very much like the same form that you would see if you were saving a document in Microsoft Word. At the bottom of this form is a field labeled “Save as Type”. This field shows all of the different file types that you can save the current report to. While you are free to choose any of the available type to save your report to, the recommended format is “Adobe Acrobat (*.pdf)”. This file type will save the report exactly as you see it on your screen and can easily be sent to someone who may not be able to view other file types.

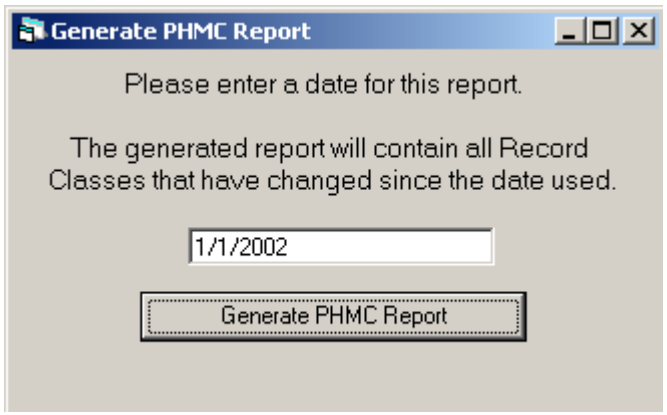
6.2. Viewing/Printing Other Records Retention Schedule Reports

Most of the other reports within Records Retention Schedule work in much the same way as the Single Record Class Report that was described in the previous section. Please note that access to some of these reports is restricted to users with Data Administrator permission. If your user account does not have data administration permissions in Records Retention Schedule, you will not be able to access some of the reports that are mentioned below.

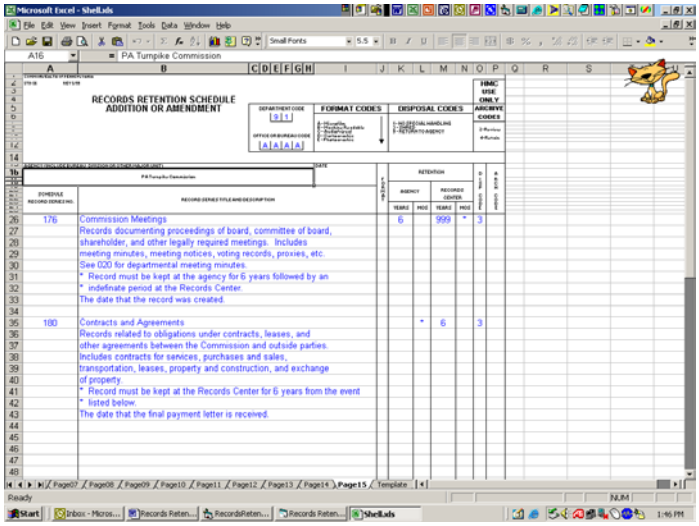
The other reports for the Records Retention Schedule are found by clicking on the small arrow that is located just to the right of the button that is used to print the Single Record Class Report. When you click on this arrow, a menu of additional reports that you are able to view is displayed.


PA Turnpike Records Retention Sched
PHMC Report
Record Class General Report
Record Class Admin Report
Record Class Comparison Report
PTC to PHMC Cross Reference

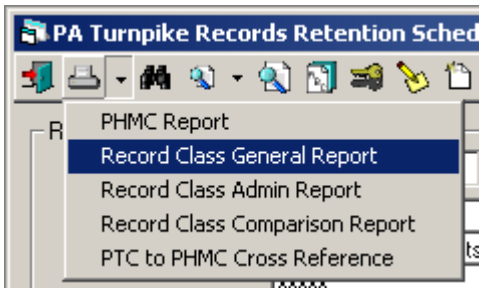
The first item in the menu is the PHMC Report. This report is actually an Excel workbook that is sent to the PHMC with updated information on our Records Retention Schedule. When you request the PHMC Report, a form will be displayed asking you for a date for the report. The program will use this date to select only those Record Classes that have been added or changed since the date that you select.


Generate PHMC Report
Please enter a date for this report.
The generated report will contain all Record Classes that have changed since the date used.
1/1/2002
Generate PHMC Report

Once you have entered a date for the report, there will be a short delay and then you will see an Excel Workbook open. The program will add pages to the Excel Workbook and fill in the appropriate information from the Records Retention Schedule. When the program is done, you can save the new PHMC Report to a file on your computers hard disk (C drive) or to a Network folder.

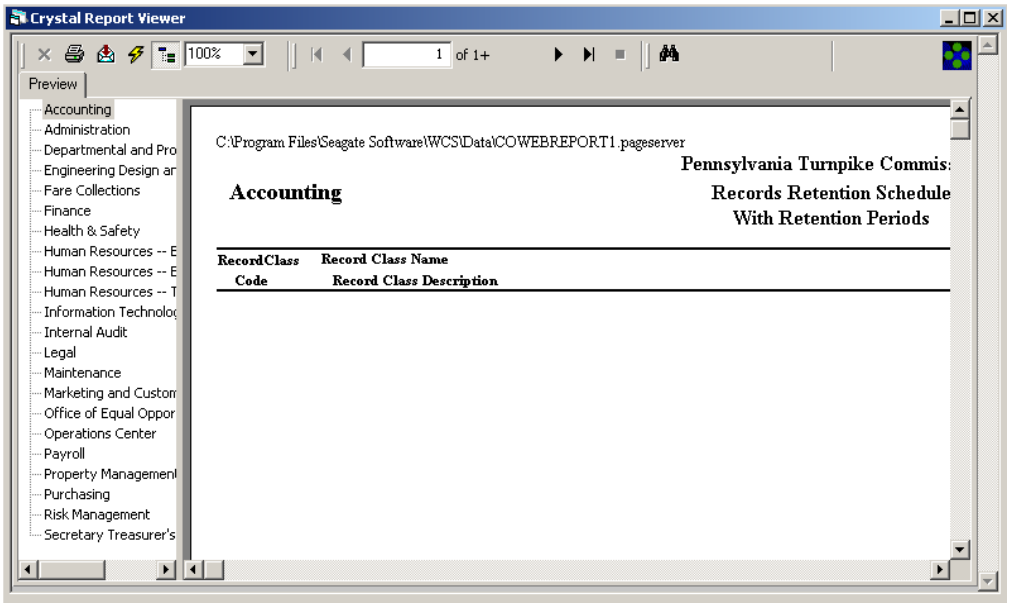

RECORDS RETENTION SCHEDULE
ADDITION OR AMENDMENT
FORMAT CODES
DISPOSAL CODES
Commission Meetings
Records documenting proceedings of board, committee of board, shareholder, and other legally required meetings. Includes meeting minutes, meeting notices, voting records, proxies, etc.
See 020 for departmental meeting minutes.
* Record must be kept at the agency for 6 years followed by an indefinate period at the Records Center.
The date that the record was created.
Contracts and Agreements
Records related to obligations under contracts, leases, and other agreements between the Commission and outside parties. Includes contracts for services, purchases and sales, transportation, leases, property and construction, and exchange of property.
* Record must be kept at the Records Center for 6 years from the event listed below.
The date that the final payment letter is received.

The process for running and viewing the remainder of the other reports in the menu is the same as described for the Single Record Class report.


PA Turnpike Records Retention Sched
PHMC Report
Record Class General Report
Record Class Admin Report
Record Class Comparison Report
PTC to PHMC Cross Reference

In this example, the Record Class General Report is being run. As before, a form will be displayed to retrieve the report from the Crystal Enterprise Report Server and display it to you.

Please Note: At the time that this manual was written, there is a bug in the Crystal Report Viewer. When you display some of the additional reports from the menu, you may find that the first page of the report does not have any information displayed. If you scroll forward through the report and then return to the first page, the missing information is usually displayed. This is a known problem and it will be fixed as soon as a solution is found.



In the Record Class General report, you will see a list of Business Functions in the column shown on the left side of the Crystal Report Viewer form. If you click on one of the Business Functions that are shown there, the Crystal Report Viewer will show the first page of the report that contains information for the Business Function that you selected.